

---

# 4.0

## Adding/Creating a Party

If this is the first time the party or creditor you are representing has entered an appearance with the court, you will need to create a party record in the court's database. A search is done to determine if a party record already exists, but is being added to a case for the first time.

This chapter will cover:

- Searching for a Party
- Creating a Party
- Adding a Party

---

# 4.1

## Searching for a Party

**Note:** If you are in doubt about whether the creditor that appears on the list is correct, then it is better to create a new party rather than make the mistake of selecting an incorrect party.

*The important thing to remember about searching by a last name is that Capitalization Counts! Smith is different from smith.*

The Search for a Party screen appears the same whether you are entering a new case or filing a motion. If you are entering a new case you **must always create a new record**, if you are filing a motion in behalf of a creditor, you may select your party from the party list that appears after your search.

**STEP 1** The first step to Adding or Creating a party is to **search the database**. When you are required to Add a party, you will get the Party Search screen

You can search for a party by social security number, Tax ID number, by a Last name or Business name.

The Name field can hold up to 200 characters.

### Search Hints

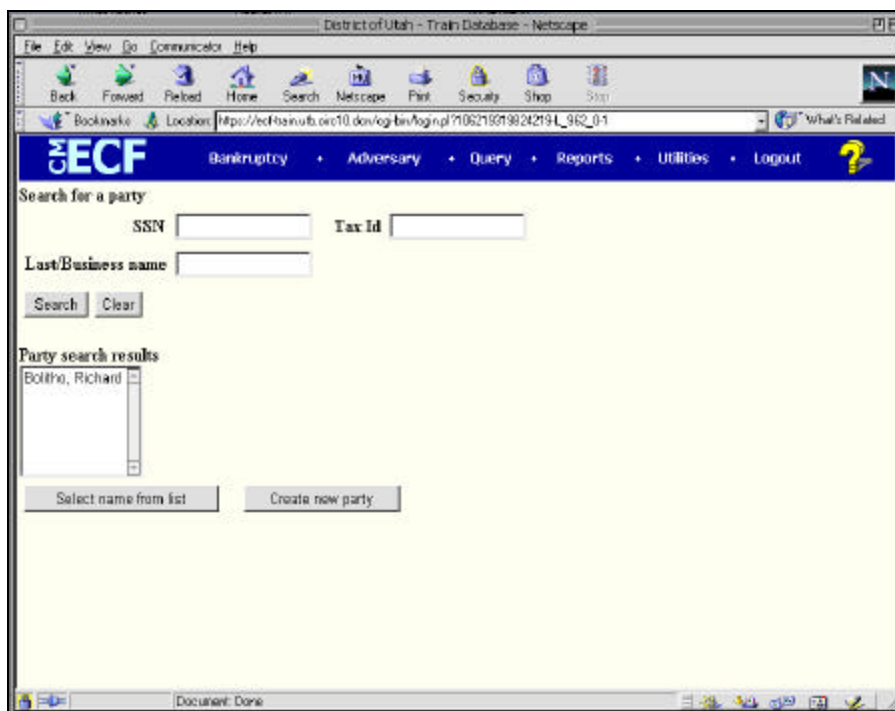
- Enter one field of data for each search.
- Format Social Security Number or Tax ID with hyphens.
- Search is case sensitive (Smith not smith).
- Include punctuation (O'Brien).
- Try alternate search clues if your first search is not successful.
- Partial names can be entered.
- Wild cards (\*) are not required at the end of search strings.
- Wild cards may be used before or within search strings (\*son, Gr?y).
- A question mark (?) represents a wild card for one character only.
- An asterisk (\*) is a wild card for any number (or none) characters.
- An asterisk (\*) **SHOULD NOT** be used by itself. It will cause a search of ALL records in the database and will use up essential resources need for other processes.

**STEP 2** After you have entered in your search parameters, click on [Search]. You will get either No person found screen or a listing of parties that match the search parameter (Figure 1).

- If you need to create a party, click on [Create new party] and go to manual section 4.2.
- If you need to add a party, click on [Select name from list] and go to manual section 4.3.

***Remember:*** When entering a new bankruptcy or adversary proceeding, do not select from the list, always create a new party.

*Selecting from the list will usually occur when filing a motion in behalf of a creditor, such as Zions First National Bank.*



**Figure 1**

# 4.2

## Creating a New Party

Creating a party record is necessary if your search for the party name was unsuccessful. This section will cover creating a new party and adding any aliases.

**STEP 1** If you get the *No Person Found* screen, you will need to add the party by clicking on the [Create new party] button. This will bring up the **Party Information** screen (see Figure 2).

*If your petition shows a middle initial rather than a full middle name, enter a period after initial.*

*Example; John W. Smith.*

*The Generation field is used for Jr., Sr., III, etc. Title field is used for M.D., D.V.M., etc.*

*If your party has a mailing address and street address, enter the mailing address in the party screen. Select the county of the mailing address.*

*If you submit this screen, after entering a party record, and do not send the completed entry to the court, an orphan is created in the system. (A record with no corresponding case). These orphan entries consume space and create a huge party list, unnecessarily. **Please try to verify your party record, before selecting submit from the screen in Figure 2.***

- **For a new case**, enter the debtor's name and mailing address information in the appropriate boxes. Select the debtor's county of residence from the drop-down menu.
- **For a creditor**, you are not required to enter the address, (but can if you wish), since notice can be sent to counsel for the creditor.
- Select the Role Type from the drop-down menu. It is important to be sure to select the correct party role.

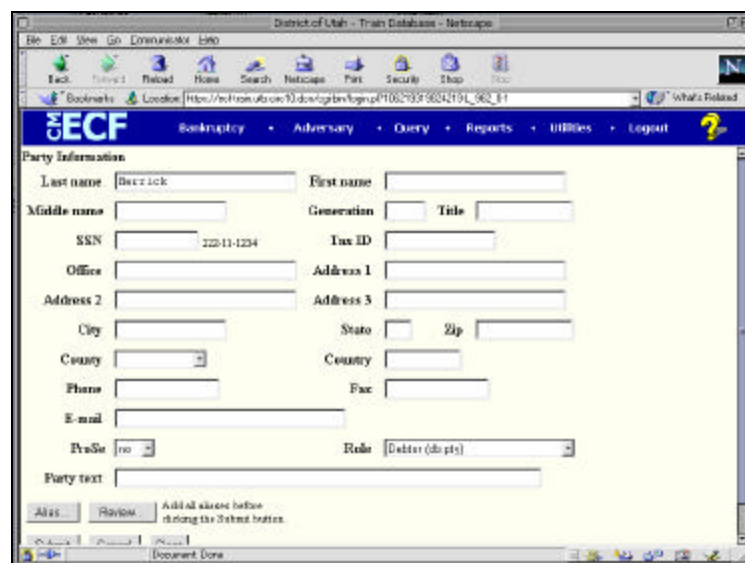


Figure 2

---

*If the party has an alias, click on the [Alias] button.*

STEP 2 The **Alias** screen appears (see Figure 3).

You can enter up to five alias names at a time. Alias Role selections include aka, dba, fdba and fka.

When you have finished adding the party aliases, click on [Add aliases].

*Often times ECF users forget to enter Alias information from a petition.*

**Remember:** Your entry should match the attached pdf image of your new case petition exactly.

STEP 3 The **Party Information** screen reappears.

Clicking on the [Review] button at any time presents a screen summarizing the alias activity for this debtor. Verify that the information is correct, and click [Return to Party Screen].

STEP 4 The **Party Information** screen will return again. If you are finished adding information for the party, and that information is correct, click on [Submit] to continue opening your case.

The screenshot shows a web browser window titled "DISTRICT OF UTAH - Train Database - Netscape". The address bar shows a URL starting with "https://ecf.usrb.clerk11.dou.gov:8443/". The page has a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area is titled "Alias Information (Party Hermick, Thomas)". It contains a table with five rows and five columns: Last/Business name, First name, Middle name, Generation, and Role. The first row is populated with "Hermick", "Thomas", and "aka". Below the table are "Add aliases" and "Clear" buttons. A note at the bottom states: "Click the Add aliases button to return to the Party screen and reenter all information for this party."

|   | Last/Business name | First name | Middle name | Generation | Role |
|---|--------------------|------------|-------------|------------|------|
| 1 | Hermick            | Thomas     |             |            | aka  |
| 2 |                    |            |             |            | aka  |
| 3 |                    |            |             |            | aka  |
| 4 |                    |            |             |            | aka  |
| 5 |                    |            |             |            | aka  |

Click the Add aliases button to return to the Party screen and reenter all information for this party.

Figure 3

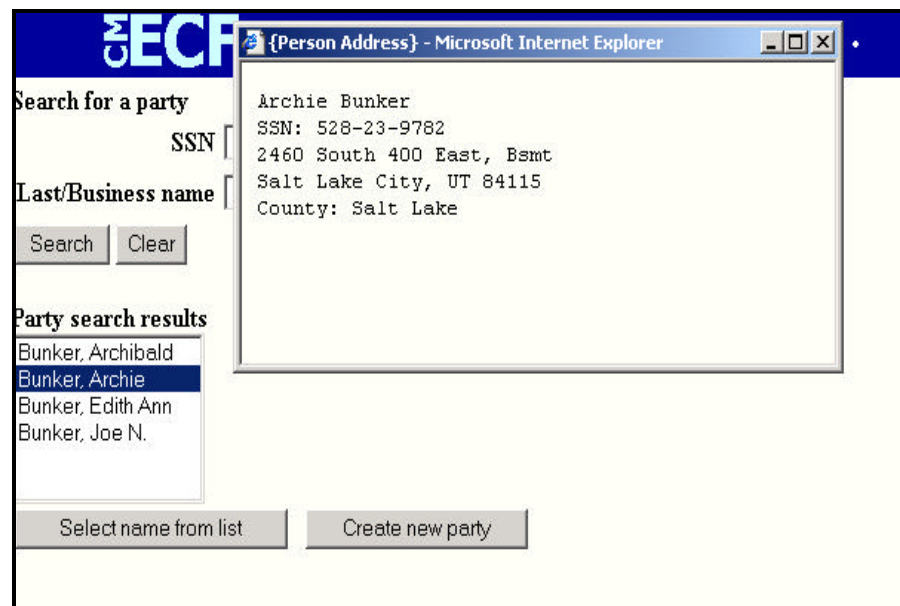
# 4.3

## Adding a Party

**Remember:** When searching for a previous debtor party record for a new case, you may use the search results to determine if your debtor has filed previously, but you should always create a new party record for new bankruptcy and adversary cases. Even if the debtor record appears with the same address. Selecting a party from the list will usually occur when adding a creditor to a case, such as Zions First National Bank.

If your search for a party returned results, you will be able to select your party name from the results list.

- STEP 1** If the search returned a number of results, you will need to select the correct party. When you click and highlight a party, a pop-up window will appear that will display the party's name and address (see Figure 4). Use this information to select the correct party. For new cases (adversary and bankruptcy), you should create a new party record with the information matching the pdf image you attach.
- STEP 2** If this information is correct, close the information pop-up and then click on the [Select name from list] button.



**Figure 4**

- STEP 3** The Party Information screen will appear. The record for the party should be correct. Identify the Role type your party is playing in this case, in the lower-right corner (see Figure 5). Enter Alias information (if any). You may click on the [Review] button to check alias information.
- STEP 4** Once you are satisfied with this screen, click on the [Submit] button to continue with your docketing event.

*The information on the party record should be correct or you should create a new record for your party. The address for a creditor you are representing is not necessary.*

The screenshot shows the ECF (Electronic Case Filing) system interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, and Reports. Below this is the 'Party Information' section for 'Thomas Herrick' with SSN: 398-12-5423. The form contains several input fields: Office (empty), Address 1 (457 E Kilpatrick Drive), Address 2 (empty), Address 3 (empty), City (Sandy), State (UT), Zip (84093), County (Salt Lake), Country (USA), Phone (801-657-3288), Fax (empty), E-mail (empty), ProSe (no), and Role (Debtor (db:pty)). There is also a 'Party text' field. At the bottom, there are buttons for 'Alias...', 'Review...', 'Submit', 'Cancel', and 'Clear'. A note next to the 'Review...' button states: 'Add all aliases before clicking the Submit button.'

**Figure 5**

---

# NOTES